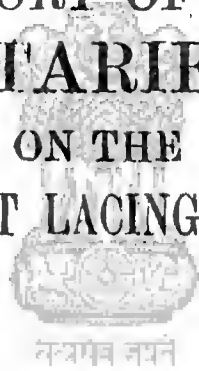




GOVERNMENT OF INDIA

MINISTRY OF COMMERCE

REPORT OF THE
INDIAN TARIFF BOARD
ON THE
STEEL BELT LACING INDUSTRY



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CONTENTS

| Paragraph. | Page. |
|---|-------|
| 1. Reference to the Board | 1 |
| 2. Terms of reference to the Board | 1 |
| 3. Action taken by the Board | 2 |
| 4. History of the industry | 2 |
| 5. Scope of the inquiry | 3 |
| 6. Raw materials | 3 |
| 7. Process of manufacture | 4 |
| 8. Uses | 4 |
| 9. Imports | 4 |
| 10. Estimated demand | 4 |
| 11. Domestic production | 5 |
| 12. Quality | 5 |
| 13. Cost of production | 6 |
| 14. Fair selling price | 7 |
| 15. Existing rate of customs duty | 8 |
| 16. C.i.f. and landed cost | 8 |
| 17. Protection recommended | 9 |
| 18. Other forms of assistance | 10 |
| 19. Eligibility for protection | 11 |
| 20. Burden on the consumers | 11 |
| 21. Conclusions and recommendations | 12 |
| 22. Acknowledgment | 13 |

APPENDICES.

| | Page. |
|---|-------|
| I. List of firms or bodies to which the questionnaire was issued | 14 |
| II. List of firms and individuals to whom invitation for oral evidence was issued | 15 |
| III. List of persons who attended the inquiry | 16 |
| IV.A. C.i.f. prices and landed costs of imported " Alligator type " steel belt lacing sent by the Collectors of Customs, Karachi and Calcutta | 17 |
| IV.B. C.i.f. prices and landed costs of imported " Alligator type " steel belt lacing as given by importers | 18 |

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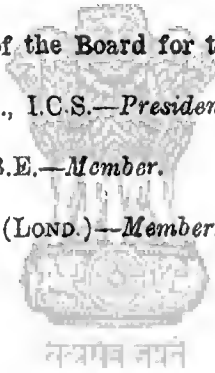
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REPORT ON THE STEEL BELT LACING INDUSTRY.

1. An application for protection of, and assistance to, the steel belt lacing industry was made to the Commerce Department, Government of India, by Messrs. Bolinjar Metal Works, Bombay, on 29th January 1946. The Engineering Association of India, Calcutta, supported the application in their letter dated 8th June 1946, addressed to the Commerce Department. The case of this industry was referred to the Board for investigation by the Government of India, Department of Commerce, in their Resolution No. 218-T (55)45, dated 12th October 1946. Subsequently, in their letter dated 21st June 1947, Messrs. Bolinjar Metal Works withdrew their application for protection of steel belt lacings, but requested that the question of general assistance to the industry, specially with regard to the supply of raw materials, should be examined by the Board. Since other manufacturers besides Messrs. Bolinjar to whom the questionnaire had been issued were also concerned with the matter, it was decided to proceed with the inquiry. At the public inquiry all the manufacturers present, including Bolinjar Metal Works, unanimously requested that the case for protection of this industry should be considered by the Board in all aspects. This was agreed to.

2. Under the terms of reference contained in the Resolution dated 12th October 1946, the Board has to satisfy itself :—

- (1) that the industry is established on sound business lines ; and
- (2) (a) that, having regard to the natural or economic advantages enjoyed by the industry and its actual or probable costs, it is likely within a reasonable time to develop sufficiently to be able to carry on successfully without protection or State assistance ; or
- (b) that it is an industry to which it is desirable in the national interest to grant protection or assistance and that the probable cost of such protection or assistance to the community is not excessive.

Where a claim to protection or assistance is found to be established, i.e., if condition (1) and condition (2) (a) or (b) are satisfied, the Board may recommend :—

- (i) whether, at what rate and in respect of what articles, or class or description of articles, a protective duty should be imposed ;
- (ii) what additional or alternative measures should be taken to protect or assist the industry ; and
- (iii) for what period, not exceeding three years, the tariff or other measures recommended should remain in force.

In making its recommendations the Board has to give due weight to the interests of the consumer in the light of the prevailing conditions and also consider how the recommendations affect industries using the articles in respect of which protection is to be granted.

3. On 18th October 1946, the Board issued a press communiqué inviting associations or persons including producers, importers, and consumers directly interested in the industry or dependent upon it for their stores, who wished their views to be considered, to submit their representations. The Board also issued detailed questionnaires to producers, importers and consumers. A list of persons, associations and firms to whom the questionnaires were issued and from whom replies or memoranda were received is given in Appendix I. A list of persons invited for oral evidence is given in Appendix II, while a list of persons who actually attended the public inquiry, which was held in Bombay on 17th July 1947, is given in Appendix III. The factory of Bolinjkar Metal Works, Bombay, was visited by the Cost Accounts Officer deputed by the Board with the help of our Technical Adviser. This factory was visited by Dr. Nazir Ahmad, Member, and Mr. Ahmadullah, Secretary, of the Board, on 24th July 1947.

4. The manufacture of steel belt lacings in India was started by the Hind Tank Manufacturing Company of Bombay in 1934. This factory was in operation up to 1942 when it was closed down owing to keen foreign competition. At the public inquiry the representative of this firm stated it has the necessary equipment and is ready to start again if it is supplied with raw materials. The principal countries supplying belt lacing to the Indian markets before the war were the U.K., Germany and the U.S.A. During the war the import of steel belt lacings fell off, and Government were faced with the problem of making supplies available from local sources. The stoppage of imports coupled with an increase in the demand for steel belt lacings gave a strong fillip to the industry. As a result, several new factories for the manufacture of this product came into existence. The Indian Engineering Works at Delhi started production in 1940, and were producing steel belt lacing under the trade mark "Centipede". In 1946 it changed hands and has since come to be known as the New India Engineering Works. It has recently suspended production but hopes to resume it as soon as raw materials are made available to it. Messrs. Harishchandra & Co., Lahore, started production in 1941, but they were also forced to suspend production a few months ago owing to their inability to compete with imports of this commodity from the U.K. Messrs. Bolinjkar Metal Works, Bombay, started manufacturing steel belt lacings of the alligator type in 1942, and since then this firm has been manufacturing steel belt lacings under the brand of "Bolinjkar". In 1943, Messrs. Madan Engineering Tool Products, Lahore, started production and have since been continually producing steel belt lacings. Thus, at present only the Bolinjkar Metal Works, Bombay, and Madan Engineering Tool Products, Lahore, are manufacturing steel belt lacings, although they too are working against heavy odds owing to the unavailability of sufficient quantities of raw materials. The other firms, which have the necessary equipment for manufacturing this product, are ready to start production as soon as they are supplied with raw materials.

5. The Indian producers manufacture only the alligator type of steel belt lacings, while they do not manufacture other types, such as the clipper type. It was therefore agreed at the public inquiry that only the alligator type of steel belt lacings should be included in the scope of the inquiry. This type of steel belt lacings is manufactured in various sizes. The details of the sizes which are produced by Bólinjkar Metal Works are given below :—

| Lacing No. | Size of lacings in inches | Use for Belting. | | Pieces of lacings supplied per box | Hinge pins | Weight per box in lbs. |
|------------|---------------------------|------------------|------------------|------------------------------------|------------|------------------------|
| | | Width inches | Thickness inches | | | |
| | | | | pairs. | pcs. | |
| 15 | 9 | 1½ to 2 | up to 5/32 | 16 (8) | 8 | 1½ |
| 20 | 12 | 1½ to 2 | 5/32 to 3/16 | 10 (5) | 5 | 1½ |
| 25 | 12 | 2 to 2½ | 3/16 to 7/32 | 16 (8) | 8 | 2½ |
| 27 | 12 | 2½ to 3 | 7/32 to 9/32 | 16 (8) | 8 | 3½ |
| 35 | 12 | 3 to 4 | 9/32 to 5/16 | 8 (4) | 4 | 2½ |
| 45 | 12 | 4 to 5 | 5/16 to 3/8 | 8 (4) | 4 | 3½ |
| 55 | 12 | 5 to 6 | 3/8 to 1/4 | 8 (4) | 4 | 4-3/4 |
| 65 | 12 | up to 8 | 1/4 to 1/2 | 8 (4) | 4 | 5-3/4 |

At the public inquiry it was stated that the most common sizes which constitute the bulk of the demand are Nos. 25, 35, 45 and 55. Accordingly, in comparing the fair selling price with the landed cost, three sizes namely 25, 35 and 55 have been taken into consideration.

6. The principal raw materials required for the manufacture of steel belt lacings and their sources of supply are as follows :—

| Raw materials | Source of supply. |
|--|----------------------|
| 1. Mild steel black sheets 12 to 22 guage | } Local. |
| 2. Galvanized steel wire 6 to 15 guage | |
| 3. Hard bright wire 3 to 10 guage | |
| 4. Tool steel of various sizes | |
| 5. Polishing materials, acids, emery powder, luster and glue | Local and im-ported. |
| | Local. |

It will be noted that most of the raw materials are locally available ; and, therefore, the industry is favourably placed in regard to raw materials. It must, however, be mentioned that mild steel black sheets which are used as the principal raw material for this product in India, being available in the country, is inferior in strength and appearance to cold rolled steel bright strips which are used by the foreign manufacturers. We

were given to understand that Tatas propose to supply panel plates for the manufacture of steel belt lacings. Though these panel plates would be an improvement on mild steel black sheets, they would still be inferior to cold rolled steel strips.

7. Mild steel black sheets of varying gauges, required according to the sizes of belt lacings, are first cut into strips of optimum dimensions, which are cleaned by immersing them overnight in an acid bath. These strips are then polished on a buffing machine, cut in a power press and embossed. The rough-cut pieces are then finished by hand for correct size, pressed for the required shape, oiled with cocoanut oil and packed in cardboard boxes, the contents of each box varying according to trade practice. In addition to the belt lacings, hinge pins at the rate of one pin per pair of lacings, and gauge pins at the rate of one pin for each box, are also provided. A new and more efficient plant, which Bolinjkar Metal Works propose to instal in the near future has provision for performing all the three operations of cutting, embossing and pressing in a single operation, and the firm hopes to effect considerable savings thereby in the cost of manufacture.

8. Steel belt lacing is used for joining two pieces of beltings together, and is, therefore, an important material which is extensively employed in factories and workshops. At the public inquiry it was stated that its use is spread uniformly in all industries in which the transmission of power by means of belting is required.

9. Since steel belt lacings are not shown separately in the Annual Imports Statement of Sea-borne Trade, it is not possible to give detailed statistics of imports from different countries for the last few years. In the memorandum submitted by the Machinery Belting Fasteners Export Group, London, it was stated that during the three years ending 31st December 1946, the members of this Group exported to India, on an average, belt fasteners of all kinds to the value of £19,193 a year. Of this amount, £13,486 represented the export value of 60,539 boxes of flexible steel belt lacings exported annually. These are the average figures for three years 1944, 1945 and 1946; while the breakup for each year, as given at the public inquiry, is as follows :—

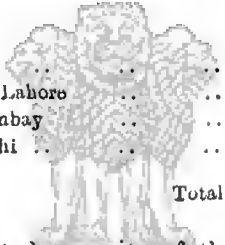
| Year. | | | | | | | Value. £ | Boxes. |
|-------|----|----|----|----|----|----|-------------|--------|
| 1944 | .. | .. | .. | .. | .. | .. | 8,171 | 39,511 |
| 1945 | .. | .. | .. | .. | .. | .. | 9,426 | 43,532 |
| 1946 | .. | .. | .. | .. | .. | .. | 22,862 | 98,576 |

In addition to these, some imports must have come from the U.S.A., but it was not possible to ascertain their quantity.

10. Since steel belt lacing is not entered separately in the Annual Imports Statement of Sea-borne Trade, it was not possible to get statistical information regarding imports on which the future estimated demand of the country might be based. The Engineering Association of India, Calcutta, estimated that the demand for the next few years may be taken at 8 to 9 lakhs of boxes per year. They admitted, however, that this was purely guess work, and at the public inquiry it was felt by the interests present that this was

largely an over-estimate. The imports of steel belt lacings in 1946 from the U.K. alone amounted to over 98,000 boxes, besides which there must have been some imports from the U.S.A. These were supplemented by the local production of the two factories, which were working in 1946. Taking these factors into account and also taking into consideration the facts that steel belt lacings have been in short supply during recent years and that their demand is likely to go up with the starting of new factories, it was agreed at the public inquiry that the Indian demand for the next three years may be estimated at 3 to 4 lakhs of boxes per annum. This agrees with the estimate given by the Department of Industries and Supplies.

11. As stated in paragraph 4, only two factories are at present in Domestic production active production, while the others have ceased production owing to unavailability of raw materials. The latter factories, however, have the necessary equipment and can go into production if raw materials are supplied to them. The following table gives the rated capacity of the different factories which have the necessary equipment. The rated capacity is based upon a single shift of 8 working hours and can be increased approximately by 100 per cent. by working these factories on double shift.



| | |
|---|------------------|
| Bolinjkar Metal Works | .. 90,000 boxes. |
| Madan Engineering Tool Products, Lahore | .. 90,000 .. |
| Hind Tank Manufacturing Co., Bombay | .. 90,000 .. |
| New India Engineering Works, Delhi | .. 48,000 .. |
| Total | .. 318,000 .. |

It will be seen that the rated capacity of the factories, which have the necessary equipment, is 3,18,000 boxes per annum on the basis of single shift. At the public inquiry, the representative of Madan Engineering Tool Products, Lahore, stated that this firm has practically completed the plans for installing additional equipment, which will give it an additional rated capacity of 1,10,000 boxes per annum. Thus, with this additional equipment to be installed by Madan Engineering Tool Products, Lahore, the total rated capacity in the country will be enough to produce 4,28,000 boxes per annum. It will thus be seen that the capacity already installed or about to be installed in the country is adequate to meet the full estimated requirements of the country during the next few years.

12. Steel belt lacing is a comparatively simple product, and the process of manufacture is also not very elaborate. The quality of the lacings depends to a very large extent upon the quality of the sheets, plates or strips from which they are made. Since mild steel black sheet (which is locally available to the Indian manufacturers) is inferior in strength and durability to the cold rolled bright steel strips from which the foreign manufactures are made, the quality of the Indian product is naturally somewhat inferior to that of the imported product. However, the

Indian product has been found quite serviceable, and no serious complaints have been made by the consumers. Given the right type of raw materials there is no reason why the Indian manufacturers should not be able to produce a product of the same quality as the imported lacings.

13. (a) It is usually the practice of the Board to cost at least two factories so that the cost of production under somewhat different working conditions may be compared and economies may be suggested wherever possible. In the present case, however, only one factory, viz., Bolinjkar Metal Works, Bombay, which is a partnership concern, was costed. This was due to the fact that at the time of the inquiry only two factories were in active production, and out of these, the Madan Engineering Tool Products, Lahore, had not submitted a written reply to our questionnaire. At the public inquiry it was explained that this was due to the disturbances prevailing in the Punjab.

(b) The rated capacity of Bolinjkar Metal Works was stated to be 90,000 boxes per annum. The Deputy Development Officer of the Industries and Supplies Department, who was present at the public inquiry stated that in view of the short supply position of steel, it would not be possible for Government to allocate full quantities of steel to belt lacing factories to work up to their full rated capacity. He stated that Government will make every effort to supply each factory with the requirement of steel up to about 60 per cent. of its rated capacity. In view of this statement, the production of Messrs. Bolinjkar Metal Works for the next two years has been taken at 60,000 boxes per annum for the purpose of calculating the costs of production.

(c) As mentioned in paragraph 5, steel belt lacings are made in numerous sizes, and it would not have been easy to determine the cost of production of all the sizes, separately. The costing was done in aspect of three sizes viz., 25, 35 and 55 only. At the public inquiry the representative of Bolinjkar Metal Works, Bombay, requested that examination of cost of production should be done *in camera*. This was agreed to, and the estimate of cost of production as finally decided by the Board, after discussion with the producers, is given in a confidential enclosure. The Bolinjkar Metal Works, of course, had no objection to the discussion of the overall costs of production as compared with the landed costs at the public inquiry.

(d) Although the Bolinjkar Metal Works are still in active production of steel belt lacings, the costs were worked out on the basis of the data available for 1943-44. This was due to the fact that the peak production of steel belt lacings by this factory was reached in 1943-44 while subsequently the production of steel belt lacings declined appreciably and the equipment of the factory was mostly used for the production of other articles such as rice huller screens and hinges. Furthermore, the financial accounts for the subsequent years were not made available to our Cost Accounts Officer. Since, however, the cost of manufacture has risen appreciably since 1943-44 in respect of several items, such as cost of raw materials, wages, etc., the 1943-44 data were adjusted to the conditions prevailing in 1947. Certain items such as

remuneration to the partners for the technical and administrative services rendered by them and advertising charges were also allowed as being reasonable. The cost data thus obtained form the basis of determining the future costs of production.

14. (a) In order to determine the measure of protection which may be necessary, it is the Board's practice to calculate the fair selling price based upon the cost of production, plus 10 per cent. return on the block capital. In the present case, in view of the fact that indigenous product suffers from prejudice in the minds of the consumers as compared with the imported product, an allowance of 20 per cent. for this prejudice has also been made. This allowance may appear to be on the high side, but it should be remembered in this connection that because the Indian manufacturers are not able to get, through no fault of theirs, raw material of the same quality as the foreign manufacturers, the prejudice against their product is very real. If the Indian manufacturers were able to get cold rolled steel strips, we would have allowed a smaller margin on account of prejudice against their products. It is, however, understood that the idea underlying the allowance for prejudice is that the Indian manufacturer should be in a position to sell his product at a cheaper rate than the imported product and thereby build up the goodwill of consumers and compete more effectively with the imported product.

(b) In working out the cost of production, the working capital has been taken as being equal to the cost of three months production, and interest at the rate of 4 per cent. on this amount has been allowed. A sum of Rs. 51,990 has been taken as the block capital representing the cost of the machinery, factory shed and other equipment, and profit at the rate of 10 per cent. has been allowed on the block. This works out on an average to 5.6 per cent. on the cost of production of the three sizes.

(c) It has been stated above that the financial accounts after 1944 were not made available to our Cost Accounts Officer as a result of which the estimate of the cost of production had to be based upon the 1943-44 figures subject to such modifications as were found necessary in view of the increase in labour charges and other items of expenditure. We suggest that the producers of steel belt lacings should keep their accounts in a systematic manner and upto-date so that if the industry again comes up for review at the end of the period of protection recommended by us, it may be possible for the Board to obtain more satisfactory data for estimating the cost of production.

15. Steel belt lacing is not entered separately in the Customs Tariff Existing rate of customs Schedule. The relevant extract from the Indian du y Customs Tariff 27th issue, which is applicable to steel belt lacing, is reproduced below:—

| Item No. | Name of article. | Nature of duty. | standard rate of duty. | Preferential rate if the article is the produce or manufacture of | | |
|----------|--|-----------------|-------------------------|---|-------------------|--------|
| | | | | The U. K. | A British Colony. | Burma. |
| 72 | Machinery, namely such of the following articles as are not otherwise specified:— (c) apparatus and appliances, not to be operated by manual or animal labour, which are designed for use in an industrial system as parts indispensable for its operation and have been given for that purpose some special shape or quality which would not be essential for their use for any other purpose. | Revenue | 10% <i>ad valorem</i> . | .. | .. | Free. |

16. (a) The Board, as usual, had requested the Collectors of Customs and the leading importing firms to furnish information regarding the landed cost with its break-up of steel belt lacings prevailing in pre-war years and at the present time. The information received from these sources is given in Appendix IV. A & B. So far as the post-war data are concerned, it was noticed that in many cases the landed cost relates to imports which came some months back and do not, therefore, represent the present value. At the public inquiry, Messrs. Lewis & Tylor Ltd., gave information, supported by documentary evidence, of the landed costs of imported steel belt lacings in April 1947 which being the latest figures available, are taken for purposes of comparison. The representative of Messrs. Lewis & Tylor Ltd., further stated that there was no chance in the near future of the landed costs going down, but that, on the other hand, there was every likelihood of their going up. The figures, as supplied by Messrs. Lewis & Tylor Ltd., Bombay, is given below:—

| | No. 25. | No. 27. | No. 35. | No. 45. | No. 55. | No. 65. |
|---------------------------|-----------|-----------|-----------|-----------|-----------|-----------|
| | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. |
| C.i.f. price .. | 4 5 2 | 4 8 10 | 2 14 1 | 3 15 6 | 4 11 0 | 5 3 8 |
| Clearing charges @2½% | 0 1 9 | 0 1 10 | 0 1 2 | 0 1 7 | 0 1 10 | 0 2 1 |
| Landed cost without duty. | 4 6 11 | 4 10 8 | 2 15 3 | 4 1 1 | 4 12 10 | 5 5 9 |
| Duty at 10% on C.i.f. | 0 6 11 | 0 7 3 | 0 4 7 | 0 6 4 | 0 7 6 | 0 8 4 |
| Landed cost with duty | 4 13 10 | 5 1 11 | 3 3 10 | 4 7 5 | 5 4 4 | 5 14 1 |

(b) The Engineering Association of India, Calcutta, in their memorandum have stated that the steel belt lacing manufacturers in England allowed certain trade discounts which could be varied from time to time, thereby affecting the landed costs and selling prices of the products in the market. This point was examined at the public inquiry, and it was found that a system of discounts based upon the quantity of steel belt lacings purchased by the dealers was followed by the foreign manufacturers. After allowing these discounts, in the case of bulk purchases, the prices at which steel belt lacings were supplied to the dealers were about 6 per cent higher than the landed costs indicated above, the margin representing the importer's profit. It was also stated by the importers that there was no likelihood of the discounts being increased in the near future, but that on the other hand, there was every chance of the discounts being further reduced, thereby increasing the price at which steel belt lacings would be supplied to the dealers. Since the margin of profit at present allowed to the importers is reasonable, and since they categorically stated that there was no likelihood of the discounts being increased, we do not think that the fear expressed by the Engineering Association of India is real or that a serious threat to the indigenous industry is likely to be offered in this way. However, if the landed cost of the imported steel belt lacings go down appreciably below the current level, or if the selling prices in the market are manipulated by altering the discounts allowed to the dealers, the local industry, which will have to be vigilant, may approach Government for reviewing the measure of protection.

17. We have seen in paragraph 11 that the installed capacity for the manufacture of steel belt lacings in India is adequate to meet the estimated Indian requirements during the next few years. We have also seen that most of the raw materials required for the manufacture of this product are available in the country, and that if they are supplied in adequate quantities to the steel belt lacing manufacturers, they would be in a position to meet the bulk of the requirements of the country. In view of these reasons, we recommend that the steel belt lacing industry should be placed on the list of the protected industries and that protection should be given to the industry up to 31st March 1950. In order to determine the degree of protection which is required by the indigenous industry against foreign competition, it would be necessary to compare the fair selling prices with the landed costs of similar products. As stated above, we have selected three sizes, namely, nos. 25, 35 and 55 as being the most representative, and a comparison of the fair selling prices of these sizes, as arrived at by us, and their present landed costs is made below :—

| | | No. 25 | No. 35 | No. 55 |
|--------------------------|-------|-----------|-----------|-----------|
| | | Rs. a. p. | Rs. a. p. | Rs. a. p. |
| Landed cost without duty | | 4 6 11 | 2 15 3 | 4 12 10 |
| Fair selling price | | 4 0 0 | 2 6 11 | 5 6 1 |
| Duty required | | Nil | Nil | 11.7% |

It will be seen from the above statement that in the case of size nos. 25 and 35 the fair selling price of the Indian product, as estimated by us, is well below the current landed cost without duty; and, therefore, in the case of these two sizes no protective duties are necessary. In the case of size no. 55, the fair selling price is about 9 annas per box higher than the landed cost without duty and a duty of about 12 per cent would be required to equate the landed cost with the fair selling price. The existing revenue duty of 10 per cent, if converted into a protective duty, would therefore very nearly cover size No. 55. Taking all the three cases together, we consider that a duty of 10 per cent should be sufficient to protect the industry, and accordingly recommend that the present revenue duty of 10 per cent should be converted into a protective duty at the same rate which should remain in force up to 31st March 1950.

18. (a) Most of the manufacturers of steel belt lacings represented in their written memoranda that in the past they were unable to obtain adequate quantities of mild steel sheet to enable them to keep their factories working to full capacity. As a result, although they had the necessary equipment, they were forced to utilise it, for the most part, for the manufacture of other articles such as rice huller screens, hinges, box corner fasteners, cycle spanners, etc. The Development Officer, Department of Industries & Supplies, New Delhi, who was present at the public inquiry, stated that in view of the short supply position of steel, it may not be possible for Government to allocate the full quantity of steel required by the manufacturers of steel belt lacings to enable them to work their factories up to the full rated capacity. He, however, stated that every effort would be made to supply enough steel to these factories to work up to 60 per cent of their rated capacity. On the basis of the actual weights of steel belt lacings manufactured by Bolinjkar Metal Works, we have calculated that the total requirements of the steel belt lacing manufacturers for working their factories up to 60 per cent of their rated capacity, which would result in the manufacture of about 2 lakhs of boxes per year, would be about 300 tons of steel per annum. This figure has been arrived at by taking a straight mean of the weights of boxes of different sizes, but as the higher sizes such as nos. 45, 55 and 60 weigh considerably more than the lower sizes, we think that about 400 tons of steel would be required by the manufacturers to enable them to work up to 60 per cent of their rated capacity. We, therefore, recommend that Government should allocate to the steel belt lacing manufacturers at least 400 tons of steel per annum and that this quantity should be distributed amongst the various manufacturers in the ratio of their rated capacity. Further, in order to ensure that the steel supplied on the basis of our recommendation is used by the manufacturers for the production of steel belt lacings only and is not diverted to other uses which are not covered by any scheme of protection, we recommend that the allotment of steel should be made every quarter and that the steel belt lacing manufacturers should submit quarterly accounts of their production and stocks to the Development Officer who should make further allotments for the ensuing quarter on the basis of the data supplied to him.

(b) As mentioned in paragraph 6 the Indian product is made from mild steel black sheets, while the foreign products are generally made

from cold rolled steel strips which are not available in the country. Mild steel is inferior in strength and appearance to cold rolled steel strips and to this extent the Indian manufacturers suffer from a disadvantage through no fault of theirs. It was reported to us that recently Tatas have agreed to supply panel plates for the manufacture of steel belt lacings. These panel plates, if supplied, would be superior in quality to mild steel black sheets which are being used at present, but even these panel plates would be inferior in quality to cold rolled steel strips which are used by the foreign manufacturers. We recommend that early steps should be taken by Tatas to supply panel plates to the manufacturers of steel belt lacings and that in the meantime, if the manufacturers are in a position to import cold rolled steel strips to supplement such quantities of either mild steel black sheets or panel plates as they can obtain locally in order to increase their production. Government should give them all facilities for importing this material from abroad.

(c) A fair quantity of steel belt lacings is used by Railways and other Government departments. In view of the fact that this industry has now been established in India and has, in our opinion, justified its claim for protection, we recommend that so far as possible, all Government requirements of steel belt lacings should be met from indigenous production.

(d) As stated in paragraph 9, steel belt lacings are not as yet entered as a separate item in the Annual Statement of Sea Borne Trade of India. Since this industry has now been established and has been recommended for protection, it would be desirable to have accurate data with regard to its future imports as well as local production. We, therefore, recommend that steel belt lacings should henceforth be shown as a separate item in the Annual Statement of Sea Borne Trade of India and in the production statistics.

19. Although this industry was started before the war, it did not make much headway owing to the keenness of foreign competition. During the war when the Supply position became acute, the country had to depend upon the local sources for the supply of steel belt lacings. As a result, several new factories came into existence and supplied the requirements of the factories to a considerable extent. The raw materials required for the manufacture of steel belt lacings are, for the most part, locally available and there is also a good market for this product. On the whole, the industry is being run on fairly sound lines though there is room for improvement which no doubt will be made, if the industry is granted protection. In view of these reasons, we are of the opinion that the industry is eligible for protection.

20. The cost of steel belt lacings consumed in an industrial plant of an average size forms but a small proportion of the total outlay. However, since we have not recommended any increase in duty but have merely recommended that the existing revenue duty should be converted into a protective duty, the question of any additional burden being imposed on the consumers does not arise.

21. Our conclusions and recommendations are as follows :—
Conclusions and recommendations

- (i) Most of the raw materials required for the manufacture of steel belt lacings are available in the country (Para 6).
- (ii) The Indian demand for the next three years is estimated at 3 to 4 lakhs of boxes per annum (Para 10).
- (iii) The productive capacity already installed or about to be installed in the country will be adequate to meet the estimated requirements of the country during the next three years (Para 11).
- (iv) The quality of the steel belt lacings made in the country is, on the whole, satisfactory. It could be further improved if better type of steel were provided to the manufacturers (Para 12).
- (v) The producers of steel belt lacings should maintain their accounts in a systematic manner and up-to-date so that if the industry comes for review again, more accurate costing can be done (Para 13).
- (vi) The steel belt lacings industry should be placed in the list of protected industries and protection should be given to it up to 31st March 1950. The present revenue duty of 10 per cent *ad valorem* should be converted into a protective duty at the same rate and should remain in force up to 31st March 1950 (Para 17).
- (vii) Government should allocate to the steel belt lacings manufacturers at least 400 tons of steel per annum and this quantity should be distributed amongst the various manufacturers in the ratio of their rated capacity. The allocation should be done every quarter and the steel belt lacings manufacturers should submit quarterly accounts of their production and stocks to Government [Para 18(a).]
- (viii) If the steel belt lacings manufacturers are in a position to import cold rolled steel strips to supplement such quantities of either mild steel black sheets or panel plates as they can obtain locally in order to increase their production, Government should give them all facilities for importing this material from abroad [Para 18(b).]
- (ix) So far as possible, all Government requirements of steel belt lacings should be met from indigenous production [Para 18(c).]
- (x) Steel belt lacings should be shown as a separate item in the Annual Statement of Sea Borne Trade of India and in the production statistics. [Para 18(d).]
- (xi) The industry is eligible for protection (Para 19).
- (xii) There will be no additional burden on the consumers as a result of our recommendations (Para 20).

22. We wish to thank Mr. P. L. Kumar, Deputy Development Officer, Department of Industries and Supplies, who attended the public inquiry and gave us valuable help. We wish to record our appreciation of the assistance rendered to us by Mr. F. W. Alexander of Leyland & Birmingham Rubber Co. who also gave us valuable information regarding landed costs. We are also thankful to Mr. M. Ahmadullah, Secretary to the Board, Mr. R. N. Kapur, our Technical Adviser and Mr. R. Sundaram, Cost Accounts Officer, for the help they have rendered in the course of the inquiry.

C. C. DESAI,
President.

NAZIR AHMAD,
Member.

H. L. DEY,
Member.

M. AHMADULLAH,
Secretary.
Bombay, 4th August, 1947.



APPENDIX I.

List of firms or bodies to which the questionnaire was issued.

| | Rated capacity form received or not. | Questionnaire replied or not. |
|--|--------------------------------------|-------------------------------|
| PRODUCERS : | | |
| *1. Bolinjkar Metal Works, Bombay | Yes | Yes |
| 2. Hararwala T. G. & Co., Bombay | No | No |
| 3. Hind Tank Manufacturing Co., Bombay | No | No |
| 4. N. K. De Brothers, Calcutta | No | No |
| 5. Machine Parts, Co., Calcutta | No | No |
| 6. Sinha B. & Co., Calcutta | No | No |
| 7. Shafi & Company, Calcutta | No | No |
| 8. Shilpa—Peeth Ltd., Calcutta | Yes | No |
| 9. Gupta Iron and Brass Works, Delhi | No | No |
| 10. New India Engineering Works, Delhi | Yes | No |
| 11. Ganesh Engineering Works, Lahore | No | No |
| 12. Harishchandra & Co., Lahore | Yes | No |
| 13. Hind Metal Works, Lahore | No | No |
| 14. Madan Engineering & Tool Products, Lahore | Yes | No |
| IMPORTERS : | | |
| 1. H. F. Higgins (Eastern) Ltd., Bombay | No | |
| 2. Lewis & Tylor Limited, Bombay | No | |
| *3. Batliboi & Company, Bombay | Yes | |
| 4. Ormerods (India) Ltd., Bombay | No | |
| 5. The Sizing Materials Co., Ltd., Bombay | No | |
| 6. A. H. Hassanally & Co., Madras | No | |
| 7. A. Ali Hasein & Co., Madras | No | |
| 8. H. Hassan & Co., Madras | No | |
| 9. The Nagdevi Tool Steel Mart, Bombay | No | |
| 10. Products Association, Bombay | No | |
| 11. Crator & Knight, Bombay | No | |
| 12. Gannon & Dunkerly, Bombay | No | |
| 13. Binny & Co., Limited, Madras | No | |
| 14. Garlick & Co., Bombay | No | |
| *15. The India Rubber Gutta Percha & Telegraph Works, Co. Ltd., Calcutta | Yes | |
| 16. M. C. Sundararajan & Co., Madras | No | |
| 17. Wazir Chand & Brothers, Lahore | No | |
| 18. Belting & Leather Products Association, Bombay | No | |
| 19. Simpson & Munro Limited, Calcutta | No | |
| 20. Shaw Wallace & Co., Calcutta | No | |
| 21. Balmer & Lawrie Co. Ltd., Calcutta | No | |
| *22. The Leyland & Birmingham Rubber Co. (India) Limited, Calcutta | Yes | |
| *23. Robert McLean & Co., Bombay | Yes | |
| *24. Elford Edwards Limited, Calcutta | Yes | |
| 25. Machinery Belting Fastener Export Group, London | Memoranda received. | |
| CONSUMERS : | | |
| 1. Lewis & Tylor Limited, Calcutta | No | |
| 2. Batliboi & Company, Bombay | No | |
| 3. Nagdevi Tool Steel Mart, Bombay | No | |
| 4. Binny & Company, Limited, Madras | No | |
| 5. Garlick & Co., Bombay | No | |
| *6. The Muir Mills Co. Ltd., Cawnpore | Yes | |
| 7. Cawnpore Cotton Mills Co., Cawnpore | No | |
| 8. Wazir Chand & Brothers, Lahore | No | |
| 9. Indian Tea Association, Calcutta | No | |
| 10. Richardson & Cruddas Limited, Bombay | No | |
| 11. Railway Board, New Delhi | No | |
| *12. Gun & Shell Factory, Cossaiore | Yes | |
| *13. Rifle Factory, Ishapore | Yes | |
| *14. Buckingham & Carnatic Co. Ltd., Madras | Yes | |
| *15. Oudh Tirhut Railway, Gorakhpur | Yes | |

APPENDIX II.

List of firms and individuals to whom invitation for oral evidence was issued.

PRODUCERS :

1. M/s. Bolinjar Metal Works, Nana Chowk, Bombay 1.
2. M/s. Harishchandra & Company, 53, Brandreth Road, Lahore.
3. Madan Engineering Tool Products, 37, McLeod Road Lahore.
4. New India Engineering Works, Roshanara Road, Delhi.
5. Hind Tank Mfg. Co., Trimbuk Pursram St., Coopers Compound, Bombay 4. { Not manufacturing now
but were pioneers of
this industry.
6. Engineering Association of India, 102A, Clive Street, Calcutta.

IMPORTERS :

1. Batliboi & Company, Forbes Street, Bombay.
2. Roberts McLean & Co. Ltd., Ilaco House, Sir P. M. Road, Bombay.
3. Elford, Edwards, Limited, 7, Old Court House Street, Calcutta.
4. The Machinery Belting Fastener Export Group, Aldwych House, London, W. C. 2.
5. Leyland & Birmingham Rubber Company, 12, Mission Row, Calcutta.
6. Wazirchand & Brothers, Lahore.
7. A. H. Hassanally & Company, Madras.

CONSUMERS :

1. The Director of Railway Board, Delhi.
2. The Controller of Stores, G. I. P. Rly., Bombay.
3. The Controller of Stores, M. & S. M. Rly., Madras.
4. Hindustan Construction Co. Ltd., Bombay.
5. The Muir Mills Co. Ltd., Cawnpore.
6. Bombay Mill Owners' Association, Patil House, Churchgate Street, Bombay.
7. Ahmedabad Mill Owners' Association, Lal Darwaja, P. O. Box No. 7, Ahmedabad.
8. Binny & Company, Madras.
9. Rifle Factory, Ishapore.

OFFICIALS AND OTHERS :

1. P. L. Kumar, Esq., Dy. Development Officer, Directorate general of Industries & Supplies, New Delhi.

APPENDIX III.

Steel belt lacing industry.

Place of Enquiry—Bombay.

Date of Enquiry—17th July, 1947.

LIST OF PERSONS WHO ATTENDED THE ENQUIRY.

PRODUCERS :

- | | | |
|--------------------------------------|----|--|
| 1. Mr. M. K. Chaphekar, representing | .. | M/s. Bolinjkar Metal Works, Nana Chowk, Grant Road, Bombay. |
| 2. Mr. R. D. Vidyarthi representing | .. | { Bolinjkar Metal Works, Nana Chowk, Grant Road, Bombay. Engineering Association of India, 102-A, Clive Street, Calcutta. |
| 3. Mr. Talyarkan, representing | .. | Hind Tank Mfg., Co., Trimbuk Purnam Street, Cooper's Compound, Bombay 4. |
| 4. Mr. Kundanlal, representing | .. | Madan Engineering Tools Products, 37, McLeod Road, Lahore. |
| 5. Mr. Khosla, representing | .. | New India Engineering, Works, Roshanara Road, Delhi. |

IMPORTERS :

- | | | |
|-------------------------------------|----------------|--|
| Mr. L. A. Butterworth, representing | .. | { Machinery Belting Fastener Export Group, Aldwych House, London, W. C. 2. Roberts Mclean & Co., Ltd., Ilaco House, Sir P. M. Road, Bombay 1. |
| Mr. F. W. Alexander, representing | .. | Leyland & Birmingham Rubber Co., 12, Mission, Row, Calcutta. |
| Mr. Rutherford, Mr. Wilson, | } representing | Lewis & Tylor Ltd., Shorab House, Hornby Road, Bombay. |

CONSUMERS :

- | | | |
|-----------------------------------|----|---|
| Mr. Subbiah, representing | .. | Director of Railway Board, Delhi. |
| Mr. P. C. Chatterji, representing | .. | Controller of Stores, G. I. P. Rly., Bombay. |
| Mr. P. S. Deo, representing | .. | The Hindustan Construction Co., Ltd., Construction House, Ballard Estate, Bombay. |

OFFICIALS :

- | | | |
|-------------------------------|----|--|
| Mr. P. L. Kumar, representing | .. | Department of Industries & Supplies, Government of India, New Delhi. |
|-------------------------------|----|--|

APPENDIX IV A.

C.I.F. prices and landed cost of imported "Alligator Type" steel belt lacing, prices sent by the collector of customs, Karachi and Calcutta, prices per box in rupees, annas and pies.

| | | Karachi (1947). | | | Calcutta. | | | | 1945. | | | | |
|------------|---------------------------|-----------------|-----------|-------------|-----------------------|---------------------|----------------------------------|--------------|-----------|---------------------|--------------------------------|--------------|--------|
| Serial No. | Steel Belt Lacing Number. | C. I. F. | | Duty @ 10%. | Total C. I. F. value. | 1936. | | Landed cost. | 1945. | | | | |
| | | Rs. a. p. | Rs. a. p. | Rs. a. p. | C. I. F. | Customs Duty @ 10%. | Clearance & other charges @ 2½%. | | C. I. F. | Customs Duty @ 10%. | Clearance & other charges 2½%. | Landed cost. | |
| 1 | 15 | 1 13 0 | 0 3 0 | 2 0 0 | 2 0 0 | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | |
| 2 | 20 | 1 13 0 | 0 3 0 | 2 0 0 | 2 0 0 | .. | .. | .. | .. | .. | .. | .. | |
| 3 | 25 | 3 10 0 | 0 6 0 | 4 0 0 | 4 0 0 | 3 8 3 | 0 5 8 | 0 1 5 | 3 15 4 | 3 12 10 | 0 6 1 | 0 1 6 | 4 4 5 |
| 4 | 27 | 3 14 0 | 0 6 0 | 4 4 0 | 4 4 0 | 3 11 8 | 0 6 0 | 0 1 6 | 4 3 2 | 4 0 6 | 0 6 5 | 0 1 7 | 4 8 6 |
| 5 | 35 | 2 8 0 | 0 4 0 | 2 12 0 | 2 12 0 | 2 6 3 | 0 3 10 | 0 1 0 | 2 11 1 | 2 9 5 | 0 4 2 | 0 1 0 | 2 14 7 |
| 6 | 45 | 3 6 0 | 0 5 0 | 3 11 0 | 3 11 0 | 3 2 8 | 0 5 0 | 0 1 3 | 3 8 11 | 3 6 9 | 0 5 6 | 0 1 4 | 3 13 7 |
| 7 | 55 | 4 1 0 | 0 7 0 | 4 8 0 | 4 8 0 | 3 10 8 | 0 5 10 | 0 1 6 | 4 1 10 | 3 15 3 | 0 6 4 | 0 1 7 | 4 7 2 |
| 8 | 65 | 4 9 0 | 0 7 0 | 5 0 0 | 5 0 0 | .. | .. | .. | .. | .. | .. | .. | .. |
| 9 | 75 | 6 3 1 | 0 9 11 | 0 2 6 | 6 15 6 | 6 3 1 | 0 9 11 | 0 2 6 | 6 15 6 | 6 11 1 | 0 10 9 | 0 2 8 | 7 8 6 |

APPENDIX IV B.

C.I.F. prices and landed cost of imported "Alligator type" steel belt lacing, Prices are per Box in Rs. as. ps.

| Name of Firm. | Steel Belt Lacing Number. | Place of Export. | Pre-War 1939-39 Values. | | | | | | Present 1946-47 Values. | | | | | |
|---|---------------------------|------------------|-------------------------|-------------------|----------------------------|--------------|----------------|-----------|-------------------------|-------------------|----------------------------|--------------|----------------|-----------|
| | | | C. I. F. | Customs duty 10%. | Clearance & other charges. | Landed cost. | Selling price. | | C. I. F. | Customs duty 10%. | Clearance & other charges. | Landed cost. | Selling price. | |
| | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. | Rs. a. p. |
| McEwans Ltd. Calcutta | 15 | U. K. | 0 10 9 | 0 1 1 | 0 0 2 | 0 12 0 | 1 2 0 | .. | 2 0 7 | 0 3 2 | 0 0 8 | 2 4 6 | 2 12 0 | .. |
| " | 20 | " | 1 8 2 | 0 2 4 | 0 0 6 | 1 11 0 | 2 2 0 | .. | 4 1 3 | 0 6 4 | 0 1 3 | 4 9 0 | 5 8 0 | .. |
| " | 25 | " | 1 10 10 | 0 2 8 | 0 0 8 | 1 14 0 | 2 6 0 | .. | 4 3 9 | 0 6 9 | 0 1 3 | 4 11 9 | 5 10 0 | .. |
| " | 27 | " | 1 2 4 | 0 1 9 | 0 0 4 | 1 4 6 | 1 12 0 | .. | 2 11 6 | 0 4 4 | 0 0 9 | 3 0 6 | 3 12 0 | .. |
| " | 35 | " | 1 6 4 | 0 2 2 | 0 0 5 | 1 9 0 | 2 0 0 | .. | 3 11 6 | 0 6 0 | 0 1 0 | 4 2 6 | 5 0 0 | .. |
| " | 45 | " | 2 2 0 | 0 3 3 | 0 0 8 | 2 6 0 | 3 0 0 | .. | 4 6 9 | 0 7 0 | 0 1 4 | 4 15 0 | 5 14 0 | .. |
| " | 55 | " | 2 4 8 | 0 3 8 | 0 0 9 | 2 9 0 | 2 4 0 | .. | 4 15 0 | 0 8 0 | 0 1 6 | 5 8 6 | 6 8 0 | .. |
| Roberts McLean & Co. Ltd., Bombay. | 45 | .. | 1 11 0 | 10% | 5% | 1 15 0 | .. | .. | 2 8 5 | 10% | 5% | 2 14 6 | 5 7 3 | .. |
| Wand Birmingham Rubber Co. (India) Ltd. | 45 | U. K. | .. | .. | .. | .. | .. | .. | 3 14 7 | 0 6 3 | 0 1 3 | 4 6 1 | .. | .. |